

Visitor Profile Study

Kent County



Delaware Economic Development Office
Industry Research Section
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2003 Kent County Visitor Profile Study

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METHODOLOGY

TravelScope is a cooperative travel survey that provides detailed, comparable data about the behavior of U.S. travelers that was developed by the Travel Industry Association of America (TIA) in 1994. A panel of 565,000 households representing over a million people nationwide (one in every 224 U.S. households) is used for the survey. Each month, a fresh sample of 25,000 households are sent a questionnaire which asks for the number of trips of 50 miles or more away from home and/or overnight trips taken in the previous month by members of that household. Respondents are asked to record details of up to three trips in the previous month. Because TravelScope does not track visitor trips under 50 miles from home, such trips are not included in this study.

Weights and Projections

The survey records detailed information for up to three trips in a month; however, the total number of trips taken by members of a household in a month is also reported. Detailed characteristics of the remaining trips are extrapolated from the trip characteristics of the trips for which details were reported.

Finally, the raw sample household data gathered from the panel is balanced and projected to represent the entire U.S. household population.

2003 Program Changes

In response to requests from subscribers, TIA implemented significant changes within TravelScope in 2003 including survey card design, response choices, and weighting procedures. In general, the new survey card increased the recall of day-trips by respondents, though this varied by region. Response choices for three major categories – purpose of trip, transportation, and activities – were modified. Due to these changes, annual comparisons of these categories must be strongly cautioned and, in some instances, are not advised. Weighting procedures were also slightly changed to reflect demographic data by class-age groups and more precisely target these groups; the changes resulted in more accurate representation of younger households.

Due to program changes, 2003 serves as a benchmark year for TravelScope data. Comparisons between 2003 and previous years within this profile have been limited and still require cautious consideration.

SUMMARY

The following visitor profile for Kent County is one of three studies for Delaware focusing exclusively on tourism and includes data for 2003 and, where appropriate, the five year period for 1999 through 2003. Similar studies are available for New Castle and Sussex Counties. Using a database called TravelScope, developed by the Travel Industry Association of America (TIA), the following visitor profile was developed for Kent County.

- This visitor profile includes aggregated totals for 12 city codes available in TravelScope which represent 12 communities in New Castle County.
- This visitor profile is based on total projected trips (including pass-through visitors) and overnight stays for New Castle County.
- Data is presented annually and quarterly to demonstrate the seasonality associated with tourism and tourism activities.
- The study is limited to the following five focus areas:
 1. State of Origin;
 2. Primary Purpose of Trip;
 3. Trip Duration;
 4. Activities; and
 5. Expenditures.

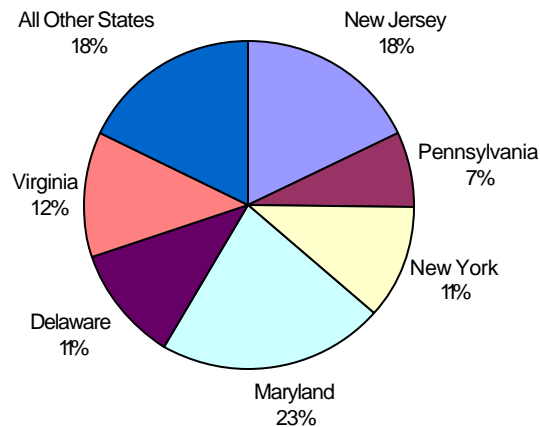
State of Origin

- In 2003, the total number of visitors to Kent County was 961,000.
- For the period 1999 to 2003, visitors to Kent County totaled 4.7 million. Ninety-one percent, or 4.3 million, indicated the county as their primary destination and/or they stayed over at least one night.
- The top six states of origin did not change significantly from 2002 to 2003, with the exception of North Carolina no longer ranking in the top six. Visitors continue to originate from nearby states.

2002
Maryland
Pennsylvania
New Jersey
Delaware
Virginia
North Carolina

2003
Maryland
New Jersey
Virginia
Delaware
New York
Pennsylvania

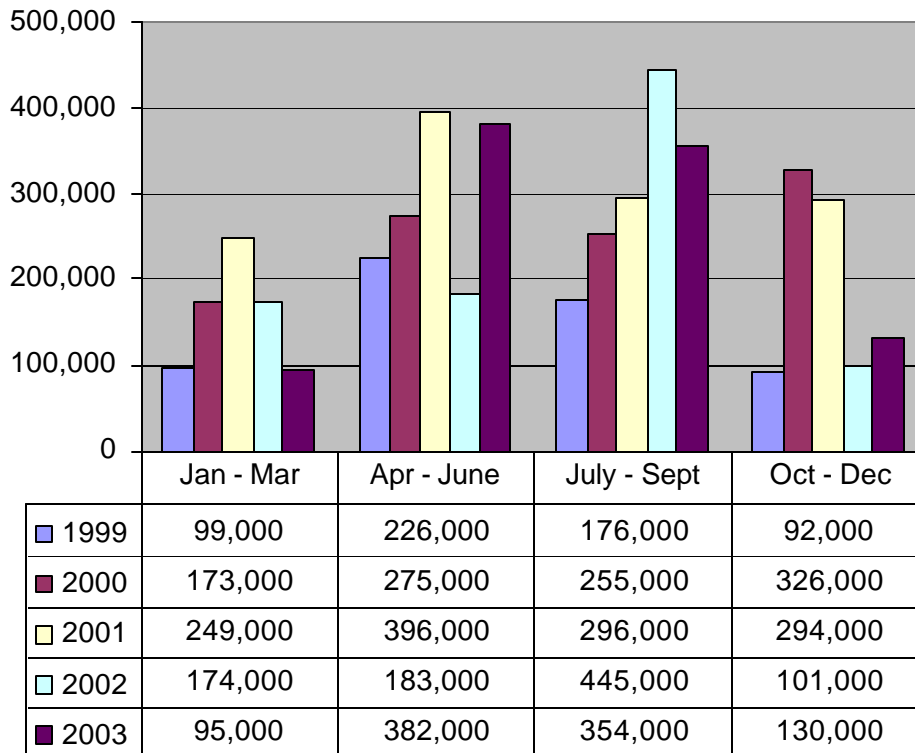
KENT COUNTY
2003 Visitor State Of Origin
Top Six States



- Shifts in seasonality associated with visitation to Kent County between 2002 and 2003 included significant decreases in the first and third quarter and significant increase in the fourth quarter.

| | <u>2002</u> | <u>2003</u> | <u>1999-2003</u> |
|-------------------------|-------------|-------------|------------------|
| 1 st Quarter | 19% | 10% | 17% |
| 2 nd Quarter | 20% | 40% | 31% |
| 3 rd Quarter | 49% | 37% | 32% |
| 4 th Quarter | 11% | 14% | 20% |

KENT COUNTY
1999-2003 Total Trips Quarterly



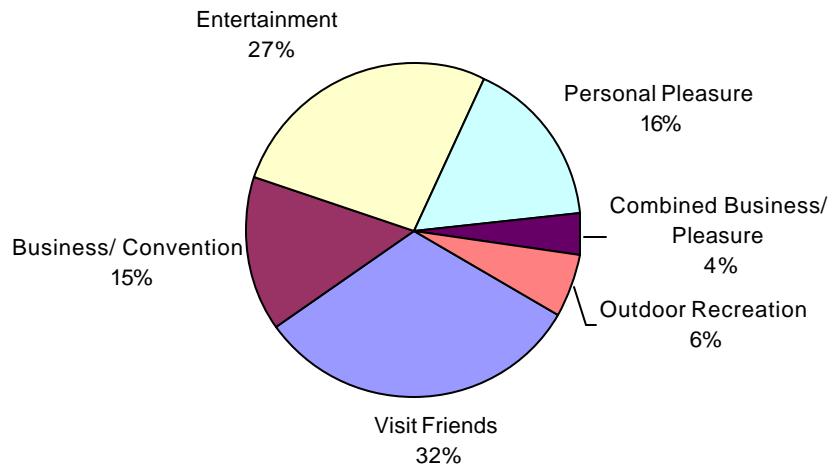
Primary Purpose of Trip

In 2003, personal and “other” categories were consolidated, and the business categories were revamped. Data comparisons between 2003 and previous years should be cautioned.

- In order of their popularity in Kent County in 2003, primary purposes for travel were visiting friends or relatives (36 percent), entertainment (31 percent), personal/pleasure (20 percent), business/convention (6 percent) outdoor recreation (5 percent), and combined business/pleasure (2 percent).

| <u>Purpose</u> | <u>2003</u> |
|----------------------------|-------------|
| Visit friends/relatives | 36% |
| Entertainment/sightseeing | 31% |
| Personal/pleasure | 20% |
| Business/convention | 6% |
| Outdoor recreation | 5% |
| Combined business/pleasure | 5% |

KENT COUNTY
2003 Primary Purpose of Trip

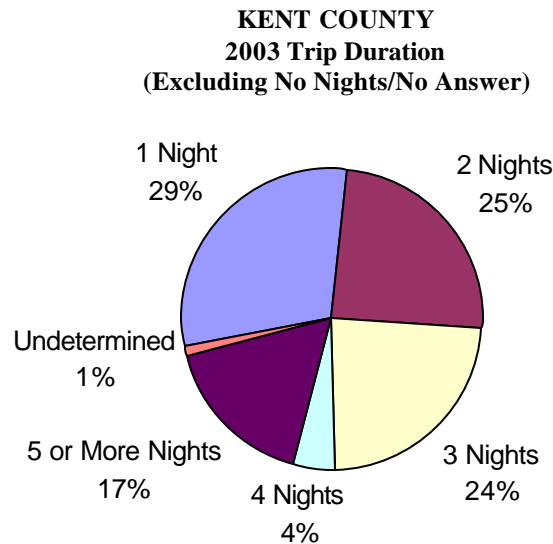


- Visiting friends or relatives and entertainment remained the two most popular purposes for traveling to Kent County during the period of 1999 to 2003.

Trip Duration

- In 2003, 51 percent, or 488,000, visitor responses regarding trip duration were no nights/no answer.
- 49 percent of visitors to Kent County stayed at least one night.
- The visitors to the county that stayed at least one night in 2002 and 2003 were as follows:

| | <u>2002</u> | <u>2003</u> |
|---------------------|-------------|-------------|
| One night | 34% | 29% |
| Two nights | 35% | 25% |
| Three nights | 10% | 24% |
| Four nights | 2% | 4% |
| Five or more nights | 19% | 17% |
| Undetermined | -- | 1% |



- Between 1999 and 2003, 49 percent of responses from visitors to the county were no nights/no answer; 51 percent stayed at least one night.
- An average of 125,000 visitors per quarter stayed one night between 1999 and 2003.

Activities

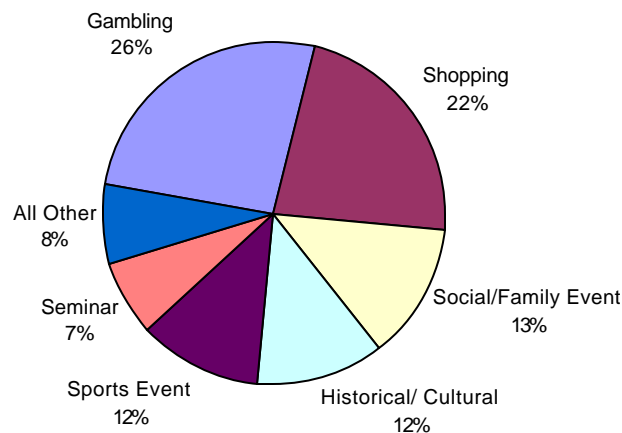
In 2003, major changes occurred in this category: a code was split, a code was dropped, and several codes were added. Additional activity options changed response patterns even for those codes that remained the same. Therefore, activity data comparisons between 2003 and previous years are not advised.

It is important to note that visitors can choose more than one activity participated in during a trip. Therefore, the percentages presented are the percent of total visitors who indicated participation in each activity. The percentages will not add to 100 percent because some visitors participate in more than one activity.

- The six most popular activities indicated by visitors in 2003 were:

2003
Gambling (26%)
Shopping (22%)
Social/family event (13%)
Historical/cultural events (12%)
Sports events (12%)
Seminar (7%)

**KENT COUNTY
2003 Activities
Six Most Popular**



- For the period 1999 through 2003, gambling and shopping were the two most popular activities for visitors.

Expenditures

- In 2003, an estimated 375,000 households spent an average \$219 per household. Total average expenditures exceeded \$82 million.
- The average number of people in a household travel party in 2003 was 2.2 persons, with an average tourism expenditure of \$100 per person.
- Statewide, an estimated 3.6 million households spent an average \$257 per household in 2003.
- Also in 2003, the average household travel party size for statewide visitors was 2.1 persons, yielding an average tourism expenditure of \$122 per person.